

**LATEST #11**

**FORMS REQUIRED: FORM 1040, SCH C, SCH SE, FORM 3800, IT540, SCH E, SCH F, SCH G, SCH H**  
**INFORMATION RETURNS ATTACHED:**

**ENTRIES NOT REQUIRING FORMS: 1040, LINE 20A: 13456, LINE 63: 6000 (4X 1500 PAYMENT)**

**TAXPAYER: NAME CHANGE**

**NAME: LATEST L JONES SSN: 400-00-4313**

**DOB: 02/01/1943**

**DISABLED: NO**

**DAYTIME PHONE: 888-555-2222**

**NAME: AMBER JONES**

**DOB: 09/13/1951 DIED 12/2007**

**DISABLED: NO**

**DAYTIME PHONE:**

**ADDRESS: 123 MAIN STREET**

**METAIRIE LA 70001**

**FILING STATUS: QUALIFYING WIDOW**

<b>DEPENDENT</b>	<b>DOB</b>	<b>AGE</b>	<b>SSN</b>	<b>DISABLED</b>
<b>AMANDA JONES</b>	<b>050590</b>	<b>18</b>	<b>400003013</b>	<b>DEAF</b>

**SCHEDULE A**

**LINE 5: ST 1003**

**LINE 6: 1084**

**LINE 9: 2087**

**LINE 10: 10039**

**LINE 14: 10039**

**LINE 16: 2200**

**LINE 19: 2200**

**LINE 28: NO 14326**

**LATEST #11**

**SCH C #1**

**NAME OF PROPRIETOR : L JONES**

**SSN: 400-00-4313**

**LINE A: PIANO TUNING**

**LINE B: 811490**

**LINE C: FINE TUNING**

**LINE F: (1) CASH**

**LINE 1: 158578**

**LINE 2: 155**

**LINE 3: 158423**

**LINE 4: 54924**

**LINE 5: 103499**

**LINE 7: 103499**

**LINE 8: 3250**

**LINE 15: 1600**

**LINE 16B: 450**

**LINE 17: 1059**

**LINE 18: 7483**

**LINE 20A: 21380**

**LINE 20B: 2400**

**LINE 21: 300**

**LINE 22: 3650**

**LINE 23: 1736**

**LINE 24A: 1784**

**LINE 25: 2981**

**LINE 26: 16300**

**LINE 28: 64373**

**LINE 29: 39126**

**LATEST #11**

**LINE 31: 39126**

**LINE 35: 9234**

**LINE 36: 55868**

**LINE 40: 65102**

**LINE 41: 10178**

**LINE 42: 54924**

**SCHEDULE SE**

**SSN: 400-00-4313**

**LINE 2: 39126**

**LINE 3: 39126**

**LINE 4: 36133**

**LINE 5: 5528**

**LINE 6: 2764**

**FORM 3800**

**LINE 6: 762 CARRYFORWARD OF KATRINA JOB RETENTION CREDIT**

**FORM 6251 ELIMINATED**

**LATEST #11**

**LA AMENDED RETURN**

<b>LA PROPERTY INSURANCE PREMIUM</b>			<b>1500</b>
<b>LA CITIZENS INSURANCE CREDIT</b>		<b>246</b>	<b>ANYTHING 0325C897</b>
<b>MILITARY FAMILY ASSISTANCE FUND</b>			<b>10</b>
<b>WILDLIFE HABITAT AND ANATURAL HERITAGE TRUST FUND</b>			<b>5</b>
<b>LA CANCER TRUST FUND</b>			<b>5</b>
<b>LA ANIMAL WELFARE COMMISSION</b>			<b>5</b>
<b>COMMUNITY BASED PRIMARY HEALTH CARE FUND</b>			<b>5</b>
<b>AMOUNT TO BE CREDITED TO 2009</b>			<b>100</b>
<b>CREDIT CARRY FORWARD FROM 2007</b>			<b>789</b>
<b>LA STATE EMPLOYEES RETIREMENT</b>	<b>(05/07)</b>	<b>02E</b>	<b>21000</b>
<b>ANNUAL RETIREMENT INCOME EXEMPTION</b>		<b>06E</b>	<b>5527</b>
<b>TAXABLE AMOUNT OF SOCIAL SECURITY</b>		<b>07E</b>	<b>11438</b>
<b>RECAPTURE OF START CONTRIBUTION</b>			<b>2100</b>
<b>INVENTORY TAX</b>			<b>94</b>
<b>CREDIT FOR TAX LIABILITIES PAID TO OTHER STATES</b>			<b>214</b>

**SCHEDULE INFORMATION INCLUDED IN SCRIPT**

**LATEST #11**

**FORM 1099-R**

**PAYER'S NAME, STREET ADDRESS CITY STATE AND ZIP**

**LASERS**

**6500 ESSEN**

**BATON ROUGE LA 70802**

**PAYER'S FEDERAL IDENTIFICATION NUMBER**

**72-8888875**

**RECIPIENT'S IDENTIFICATION NUMBER**

**400-00-4313**

**RECIPIENT'S NAME**

**LATEST L JONES**

**RECIPIENT'S STREET ADDRESS**

**123 MAIN STREET**

**RECIPIENT'S CITY STATE AND ZIP**

**METAIRIE LA 70001**

**BOX 1: GROSS DISTRIBUTION**

**21000**

**BOX 2A: TAXABLE AMOUNT**

**21000**

**BOX 4: FEDERAL INCOME TAX WITHHELD**

**4200**

**BOX 6: NET UNREALIZED**

**0**

**BOX 7: DISTRIBUTION CODE**

**7**

**LATEST #11**

**FORM 1099-R**

**PAYER'S NAME, STREET ADDRESS CITY STATE AND ZIP**

**CHASE BANK**

**450 FLORIDA BLVD**

**BATON ROUGE LA 70807**

**PAYER'S FEDERAL IDENTIFICATION NUMBER**

**72-4567890**

**RECIPIENT'S IDENTIFICATION NUMBER**

**400-00-4313**

**RECIPIENT'S NAME**

**LATEST L JONES**

**RECIPIENT'S STREET ADDRESS**

**123 MAIN STREET**

**RECIPIENT'S CITY STATE AND ZIP**

**METAIRIE LA 70001**

**BOX 1: GROSS DISTRIBUTION**

**5527**

**BOX 2A: TAXABLE AMOUNT**

**5527**

**BOX 4: FEDERAL INCOME TAX WITHHELD**

**1105**

**BOX 6: NET UNREALIZED**

**0**

**BOX 7: DISTRIBUTION CODE**

**7 IRA/SEP/SIMPLE X**

**LATEST #11**

**FORM W-2G**

**PAYER'S NAME ADDRESS ZIP CODE**

**HOLLYWOOD CASINO**

**711 HOLLYWOOD BLVD**

**BAY ST LOUIS MS 39500**

**WINNER'S NAME ADDRESS ZIP CODE**

**LATEST L JONES**

**123 MAIN ST**

**METAIRIE LA 70001**

**LINE 1:**

**7145**

**LINE 2:**

**1429**

**LINE 3:**

**SLOTS**

**LINE 4:**

**09/15/08**

**LINE 11:**

**400-00-4313**

**LINE 13:**

**MS**

**LINE 14:**

**214**

**LATEST #11**

**FORM 1040**

**NAME:**

**LATEST L JONES**

**SSN:**

**400-00-4313**

**ADDRESS:**

**123 MAIN ST**

**METAIRIE LA 70001**

**FILING STATUS:**

**QUALIFYING WIDOW**

**EXEMPTIONS:**

<b>NAME</b>	<b>SSN</b>	<b>RELATIONSHIP</b>	<b>CHILD TAX CREDIT</b>
<b>AMANDA JONES</b>	<b>400-00-3013</b>	<b>DAUGHTER</b>	
<b>LINE 12: BUSINESS INCOME</b>			<b>39126</b>
<b>LINE 15B: TAXABLE AMOUNT</b>			<b>5527</b>
<b>LINE 16B: TAXABLE AMOUNT</b>			<b>21000</b>
<b>LINE 20A: SOCIAL SECURITY BENEFITS</b>			<b>13456</b>
<b>LINE 20B: TAXABLE AMOUNT</b>			<b>11438</b>
<b>LINE 21: GAMBLING</b>			<b>7145</b>
<b>LINE 22: TOTAL INCOME</b>			<b>84236</b>
<b>LINE 27: ONE HALF SELF EMPLOYMENT</b>			<b>2764</b>
<b>LINE 36: ADD</b>			<b>2764</b>
<b>LINE 37: AGI</b>			<b>81472</b>
<b>LINE 38: AGI</b>			<b>81472</b>
<b>LINE 39A: BORN BEFORE 01/02/1944</b>	<b>X</b>		<b>1</b>
<b>LINE 40: ITEMIZED DEDUCTIONS</b>			<b>14326</b>
<b>LINE 41: SUBTRACT</b>			<b>67146</b>
<b>LINE 42:</b>			<b>7000</b>
<b>LINE 43: TAXABLE INCOME</b>			<b>60146</b>
<b>LINE 44: TAX</b>			<b>8216</b>



LINE 46: ADD	8216
LATEST #11	
LINE 54: FORM 3800	762
LINE 55: TOTAL CREDITS	762
LINE 56: SUBTRACT	7454
LINE 57: SELF EMPLOYMENT TAX	5528
LINE 61: TOTAL TAX	12982
LINE 62: TAX WITHHELD	6734
LINE 63:	6000
LINE 71: TOTAL PAYMENTS	12734
LINE 75: AMOUNT YOU OWE	248

IT540

**NAME:**

SSN:

**ADDRESS:**

**123 MAIN ST**

**METAIRIE LA 70001**

### QUALIFYING WIDOW

**LINE 6A: YOURSELF**

X

## 65 OR OLDER

# X

**TOTAL 6A & 6B**

2

### LINE 6C: DEPNEDENTS

NAME \_\_\_\_\_

SSN

## RELATIONSHIP

**BIRTH DATE**

**AMANDA JONES**

**400-00-3013**

**DAUGHTER**

**05/05/1990**

**LINE 6D: TOTAL EXEMPTIONS**

3

**LINE 7: FEDERAL AGI**

## SCHEDULE E

49439

**LINE 8A: FEDERAL ITEMIZED DEDUCTIONS**

14326

**LINE 8B: FEDERAL STANDARD DEDUCTION**

10900

**LINE 8C: EXCESS FEDERAL ITEMIZED DEDUCTION**

3426

**LINE 8D: 65% EXCESS FEDERAL ITEMIZED DEDUCTION**

2227

**LINE 9: FEDERAL INCOME TAX**

X

8216

**LINE 10: TAX TABLE INCOME**

38992

**LINE 11: INCOME TAX**

855

**LINE 13: EDUCATION**

25

**LINE 14: OTHER**

339

**LINE 15: TOTAL NONREFUNDABLE**

364

LINE 16: ADJUSTED LA INCOME TAX	491
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LINE 18: TOTAL INCOME TAX	491
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**LATEST #11**

LINE 22: LA CITIZENS INSURANCE CREDIT	246
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LINE 23: LA PROPERTY INSURANCE CREDIT	88
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LINE 24: OTHER REFUNDABLE CREDIT	94
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LINE 26: AMOUNT OF CREDIT CARRIED FORWARD	789
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LINE 30: TOTAL	1217
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LINE 31: OVERPAYMENT	726
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LINE 33: OVERPAYMENT	726
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LINE 34: MILITARY FAMILY ASSISTANCE FUND	10
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LINE 36: WILDLIFE HABITAT & NATURAL	5
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LINE 37: LA PROSTATE CANCER TRUST	5
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LINE 38: LA ANIMAL WELFARE COMMISSION	5
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LINE 39: COMMUNITY BASED PRIMARY	5
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LINE 40: TOTAL	30
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LINE 41: SUBTOTAL	696
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LINE 42: AMOUNT CREDITED TO 2009 INCOME	100
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LINE 43: AMOUNT TO BE REFUNDED	696
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**SCHEDULE H**

LINE 1:	7454
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LINE 2:	762
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LINE 3:	8216
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